

Department of Education Office of Student Financial Assistance

Rational Tool Implementation Support Team VDC Communications ClearQuest User Guide



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1. High Level Overview

The VDC Coordination Tool is a customized application that was developed using Rational ClearQuest. This tool will replace several existing informal processes and manual forms that are currently used to exchange information between the Department of Education Student Financial Assistance (SFA) program, CSC's Virtual Data Center (VDC) and Accenture Modernization Partner. This tool coupled with the successful implementation of the *VDC Coordination Process* is intended to improve coordination and reduce expenses associated with making changes to the SFA software and hardware that resides at the VDC.

Specifically, this Coordination Tool will automate change requests. The change request will follow a high level process, but will capture different information and require different levels of coordination and approvals at the more detailed level.

1.1 Tool User Group

To be determined based on discussion with VDC and SFA

1.2 Rational ClearQuest Overview

SFA selected Rational as the standard tool to use on its projects. SFA has acquired several licenses to encourage use of the different Rational applications. When a need was discovered for a way to track change requests related to the VDC, Rational ClearQuest was selected as the application to use.

ClearQuest is a change request management tool. It can be customized to track change request issues, defects, enhancements, or all of the above. It stores the records in a database and presents the records either through a full capability client or a scaled down web-based application. This user guide will focus on the ClearQuest web application.

Current Version: Rational ClearQuest 2001A.04.00 is currently installed at the VDC. Schema Repository Database: Access 2000 (will be converted to Oracle 8i in the near future)

Record Database: Oracle8i



2. Change Requests

When a user enters a new Change Request, they will need to fill in Title', Assignee's 'Name' and 'Email', which are required fields.

2.1 Change Requests

A change request is a request for any change to the VDC that alters system configuration or environment of an established baseline, whether an upgrade, modification or addition to hardware, software, firmware, application, network or infrastructure.

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3. Process Flow

ClearQuest uses **states** and **actions** to depict the life cycle of **change requests**. The **state** of a change request indicates its current status. An **action** represents the activities that can take place to move the change request from one state to another. Taken together, actions and states represent the various life cycles or process flows a change request can go through. The process flow for the VDC Communications tool is depicted in the State Transition Matrix drawing listed below:

States:

Submitted Proposed

Pending Funding CCRB Review Scheduled Rejected Resolved

Closed Successfully Closed Unsuccessfully Funding Approved

Re-Attempt

Actions:

Submit Propose Re-Submit

Request Funding Approve Funding

Review Disapprove Approve

Close Rejected Re-Schedule Implement

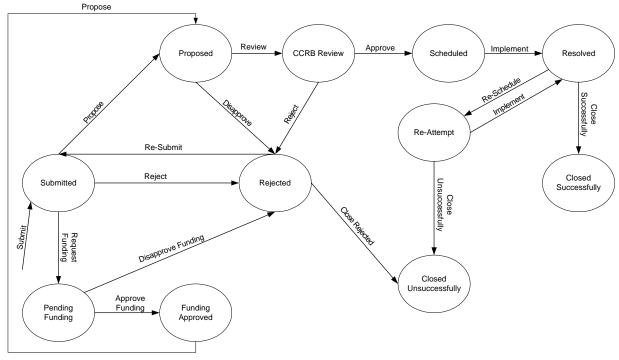
Close Unsuccessfully Close Successfully

Reject

Disapprove Funding

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State Transition Matrix

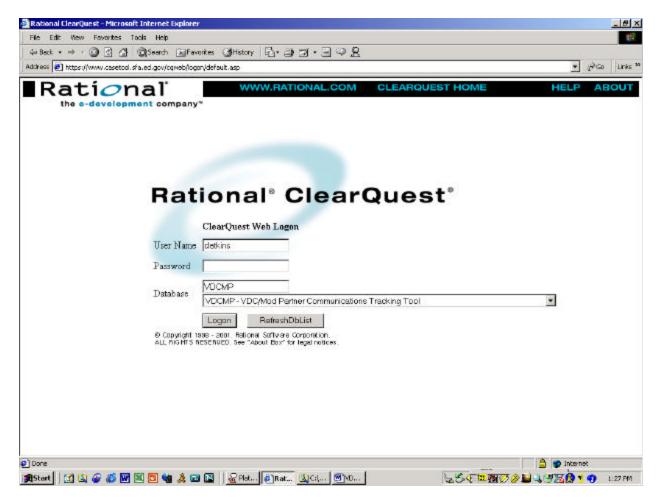
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4. Using the VDC Communications ClearQuest Schema

This section will detail how to do the basic functionality offered in the VDC Communications ClearQuest tool. It includes screen shots and instructions for the web client. Please contact the VDC Communications schema administrator for information about using the thick client if you have a need to use it. It would have to be installed on the user's machine.

4.1 Login



The screen shot above is the login screen and is required to gain access to a ClearQuest schema. The URL for this page is https://www.casetool.sfa.ed.gov/cqweb/.

**Note: If you receive an error similar to "The connection was refused when attempting to contact https://www.casetool.sfa.ed.gov/cqweb/" or "This page cannot be displayed", then please refer to section 7 to properly set up the proxy server.

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The following steps are required to log into the web client:

- 1. Type your user name into the 'User Name' text field.
- 2. Type your password into the 'Password' text field.
- 3. Select the proper database using the drop-down selection widow.
- 4. Click the 'Logon' button.
- 5. If you have entered the wrong password or selected the wrong database, click the RefreshDbList button or the 'Logon Again' button. Then repeat steps 1 4.

4.2 Submitting a new Change Request

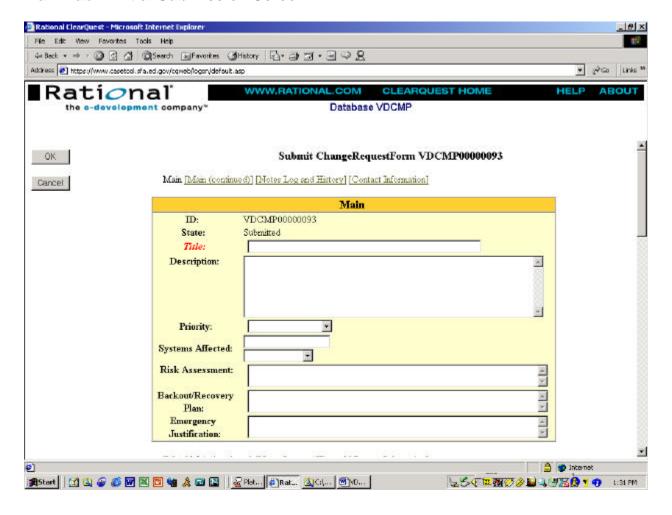


Once you have properly logged in, you will gain access to the desired schema. To enter a new change request, you will need to click the 'Submit' link in the horizontal menu bar in the screen shot above. Make sure 'ChangeRequestForm' is selected in the drop-down list next to 'Submit'. This will allow you to enter a new change request to the database.

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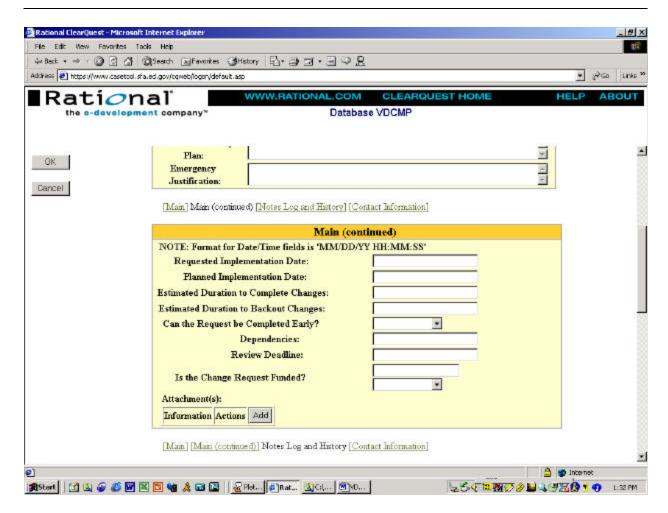


Main Tab - Initial Submission Screen



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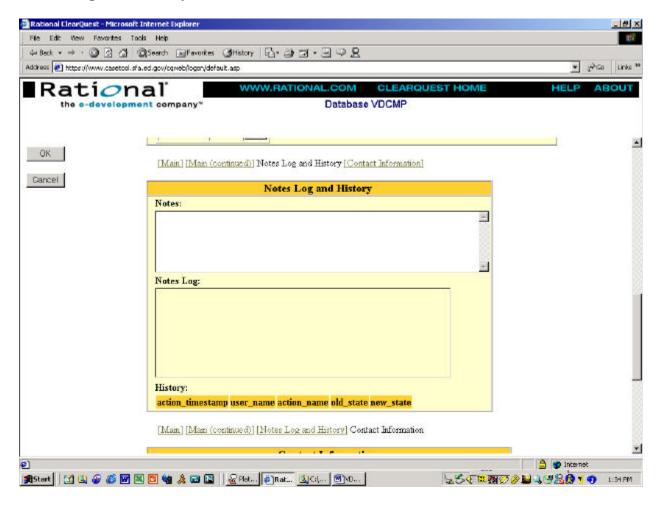


On the Main tab, you will notice that 'ID' and 'State' are already pre-populated. However, the user is required to enter information into the 'Title' text field, as signified by the red font color.

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Notes Log and History Tab

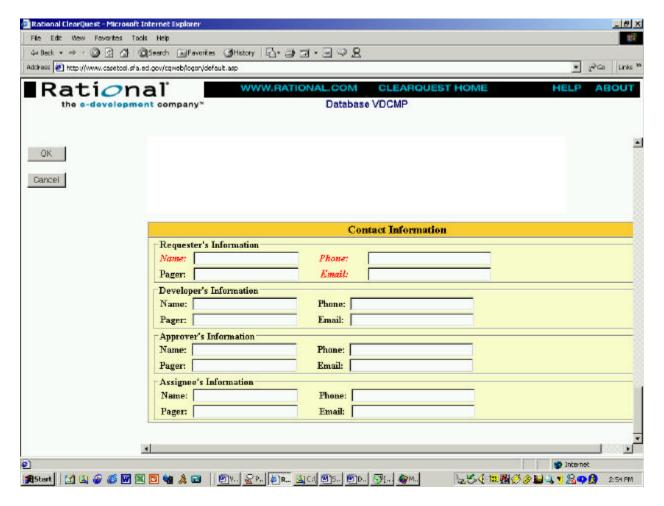


The 'Notes Log and History Tab' will allow the user to describe the change request, review other notes about the change request, and see when the changes occurred. Although this tab can contain a great detail of information, none of these fields are absolutely required by the ClearQuest tool to proceed with the change request process, but the user should enter as much information as possible to avoid future delays.

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Contact Information Tab



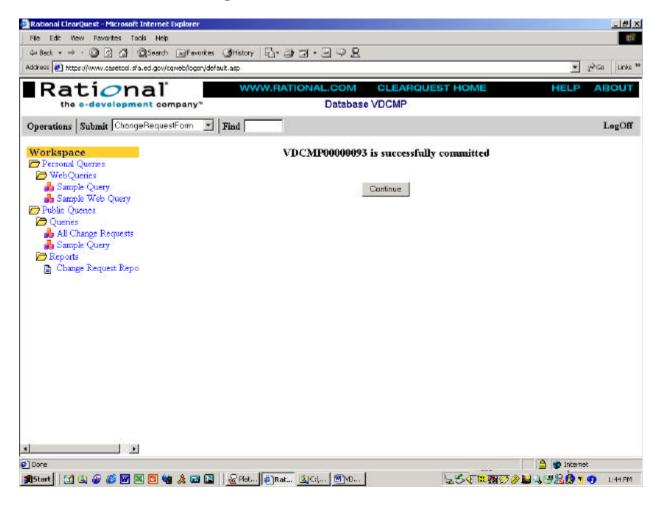
The 'Contact Information' tab allows the user to determine the requester, the developer, the approver, and the assignee of the change request. Only the requester's name, phone and email are required for submission.

To complete the submit process, the user should click on the 'OK' button.

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Successful Submission Page

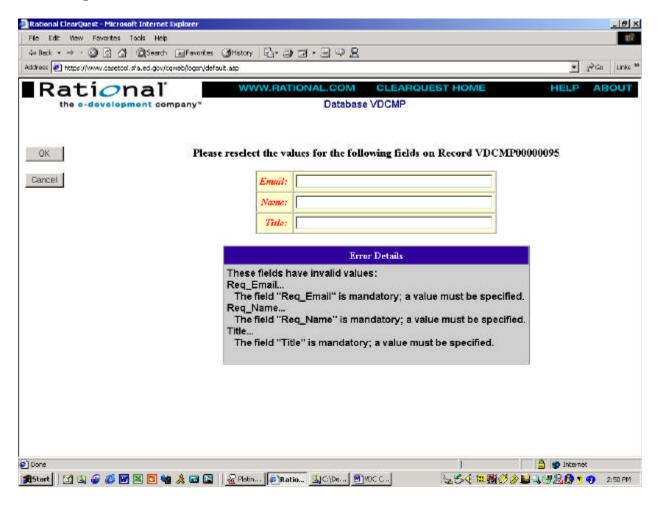


Once the change request has been submitted, the user will receive a confirmation page stating that the request was successfully committed to the database.

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Error Page

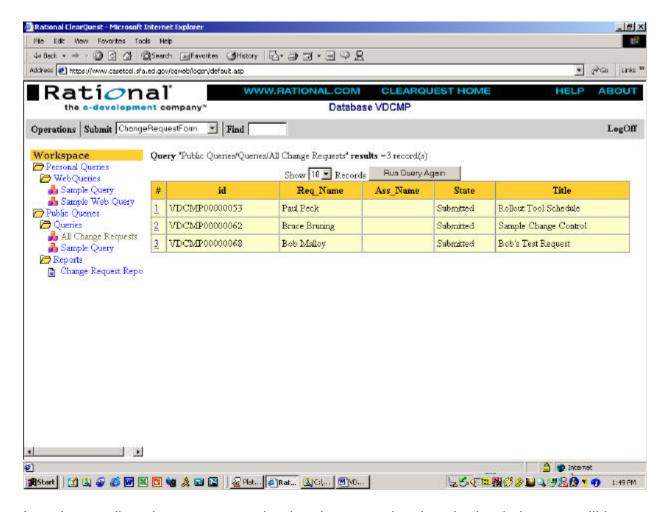


An error page will be displayed if the required fields are left blank. The above page is an example of all the required fields left blank.

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4.3 Modifying an Existing Change Request

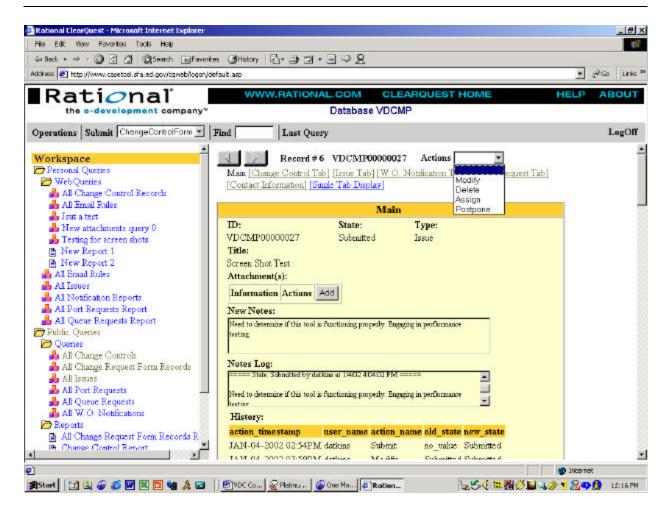


In order to edit a change request that has been previously submitted, the user will have to select an existing query from the 'Public Queries' – 'Queries' folder or select a query created in the personal folder. The above is an example screen shot of the 'All Change Request Form Records' in the 'Public Queries' – 'Queries' folder.

The user will have to click the numbered hyper link, located in the column labeled '#', in order to gain access to a particular change request.

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Assuming that Record #6 was selected from the previous page, the page above will be displayed. As shown, the 'Actions' selection window will allow the user to modify, delete, or authorize the change request. (Please refer to section 3 to determine the process flow of the change requests.)

Initially the change record will be displayed as read-only. However, if the user selects 'Modify', or any other available choice other than 'Delete', as the desired action, changes can be made within the text fields.

**Note: Refer to section 3 to see the Process Flow for section 4.4 – 4.11.

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4.4 Submitted State

A change request moves to the 'Submitted' state after being submitted from the user making the change request or being re-submitted from the 'Rejected' state. From the 'Submitted' state, the change request can move to the 'Rejected' state, the 'Pending Funding' state, or the 'Proposed' state.

4.5 Proposing an Existing Change Request

A change request moves to the 'Proposed' state after being proposed from the 'Submitted' and 'Funding Approved' states. From the 'Proposed' state, the change request can move to the 'CCRB Review' state or the 'Rejected' state.

4.6 Rejecting an Existing Change Request

A change request moves to the 'Rejected' state after being rejected from the 'Submitted', 'Pending Funding', and 'CCRB Review' states, and disapproved from the 'Proposed' state. From the 'Rejected' state, the change request can move back to the 'Submitted' state if the change request was re-submitted or to the 'Closed Unsuccessfully' state if the change request has been closed.

4.7 Pending Funding State

A change request moves to the 'Pending Funding' state from the 'Submitted' state if funding is needed. Once funding is approved and attained, the change request can move to the 'Funding Approved' state or move to the 'Rejected' state if funding is disapproved.

4.8 Funding Approved State

A change request moves to the 'Funding Approved' state from the 'Pending Funding' when funding is approved. From the 'Funding Approved' state, the change request can move to the 'Proposed' state.

4.9 CCRB Review State

A change request moves to the 'CCRB Review' state after being reviewed from the 'Proposed' state. From the 'Approved' state, the change request can move to the 'Scheduled' state or the 'Rejected' state.

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4.10 Scheduling an Existing Change Request

A change request moves to the 'Scheduled' state after being approved from the 'CCRB Review' state. From the 'Scheduled' state, the change request can move to the 'Resolved' state.

4.11 Resolving an Existing Change Request

A change request moves to the 'Resolved' state after being implemented from the 'Scheduled' or 'Re-Attempt' states. From the 'Resolved' state, the change request can move to the 'Closed Successfully' state or to the 'Re-Attempt' state.

4.12 Re-Attempting an Existing Change Request

A change request moves to the 'Re-Attempt' state after being re-scheduled from the 'Resolved' state. From the 'Resolved' state, the change request can move back to the 'Resolved state or to the 'Closed Unsuccessfully' state.

4.13 Successfully Closing an Existing Change Request

A change request moves to the 'Closed Successfully ' state after being successfully closed from the 'Resolved' state.

4.14 Unsuccessfully Closing an Existing Change Request

A change request moves to the 'Closed Unsuccessfully' state after being closed from the 'Rejected' state.

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5. Queries

In order to find a specific change request, 'Queries' are used to locate specific records from the database. There are two main folders in the Workspace: 'Personal Queries' and 'Public Queries'. Any queries created by users are always stored in the 'Personal Queries' folder. Several predefined queries have been created during the development of the VDC Coordination tool and are located in the 'Public Queries' folder.

5.1 Predefined Queries

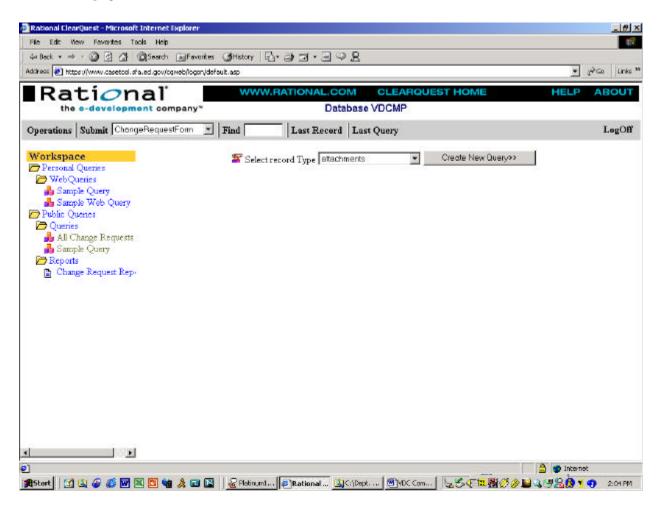
Listed below are the existing queries available to anyone. To run a query, select the 'Public Queries' folder. Then select the desired query in the 'Queries' folder.

- Sample Query Displays a summary view of the change request. This summary includes '#' and 'Title' fields. To see the actual change request, click on the numbered hyper link in the far left column.
- All Change Request Displays a summary view of the change request. This summary includes '#', 'ID', 'Requester's Name', 'Assignee's Name', 'State', and 'Title' fields. To see the actual change request, click on the numbered hyper link in the far left column.

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5.2 Creating Queries

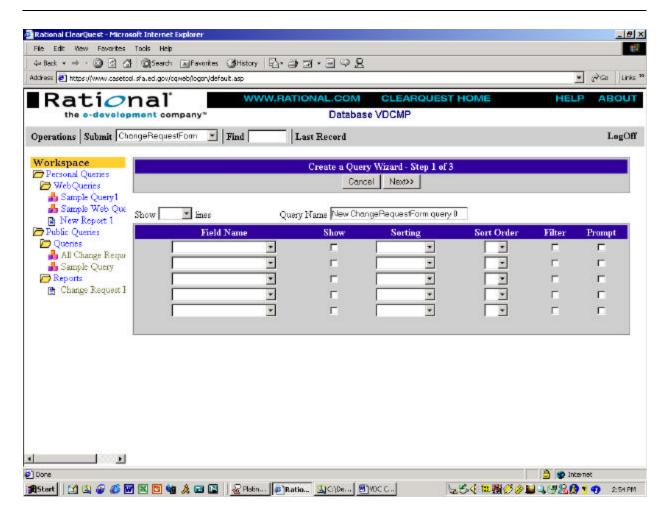


ClearQuest includes ready-to-use queries that help the user to locate records by project or component, by assigned engineer, by level of severity, and so on. If these are not sufficient, ClearQuest also allows the user to create his own query.

To create a new query, the user must select 'Create a Simple Query' in the 'Operations' menu. Once this is done the page above will be displayed. The user must select the 'ChangeRequestForm' record type for the query in the 'Select Record Type' selection window. Once this is done, the user must click the 'Create New Query' button.

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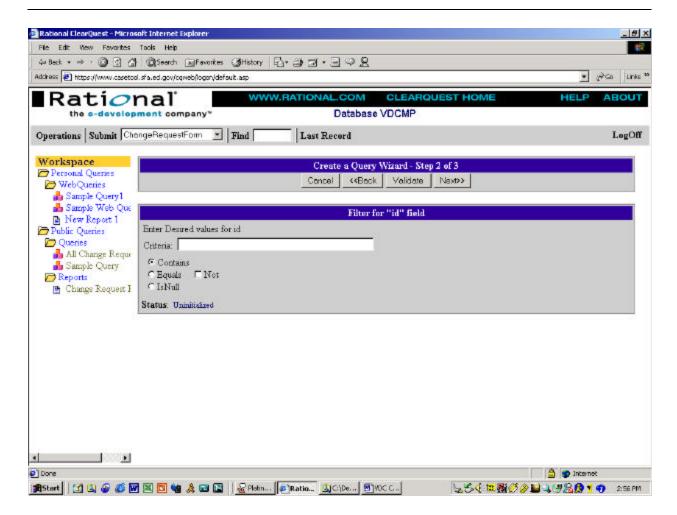




Once the 'Create New Query' button is clicked, the page above will appear. The user will be able to create a query based on certain information. The user must name the query, select which field names to query from and determine if a specific displaying order is needed. If the user checks the 'Filter' box, the desired value can be selected on the screen shot below. Once this is determined, the user must click the 'Next' button.

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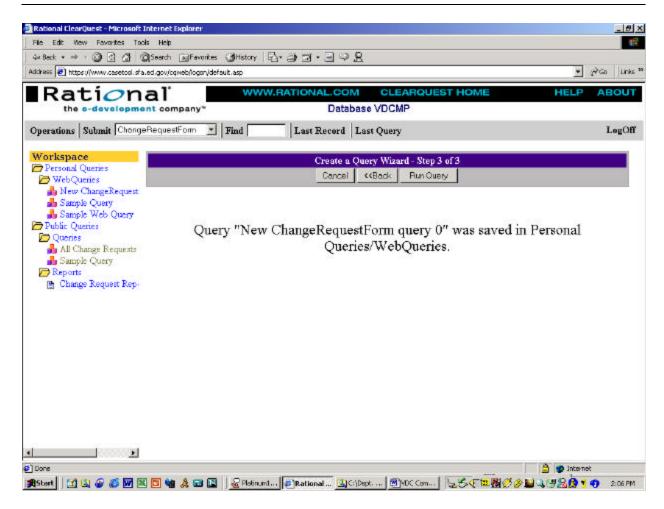




Within the 'Criteria' field, the user can enter a value to index the filtered information. The 'Contains' radio button, the 'Equals' radio button, the 'Not' check box, and the 'IsNull' radio button are used to help filter the information. For fields with drop-down lists, the values are available on this screen.

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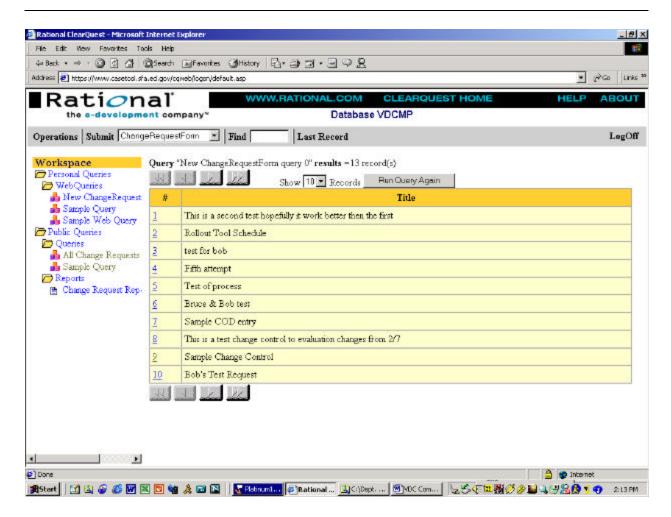




Once the criteria are entered and the 'Next' button is clicked, the page above will be displayed. The user can cancel creating a new query, go back to the previous page, or run the query.

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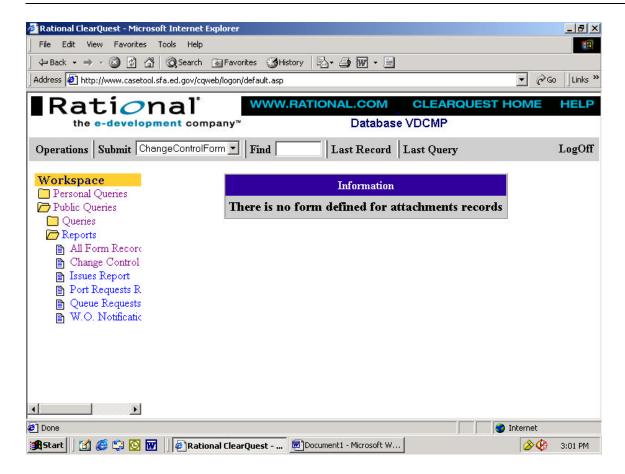




If the user clicks the 'Run Query' button, a query will be run based on the information entered in step 1. If results are found according to the search criteria, then the records will be displayed. The user can click the numbered hyper link to see the actual change request that is being referenced.

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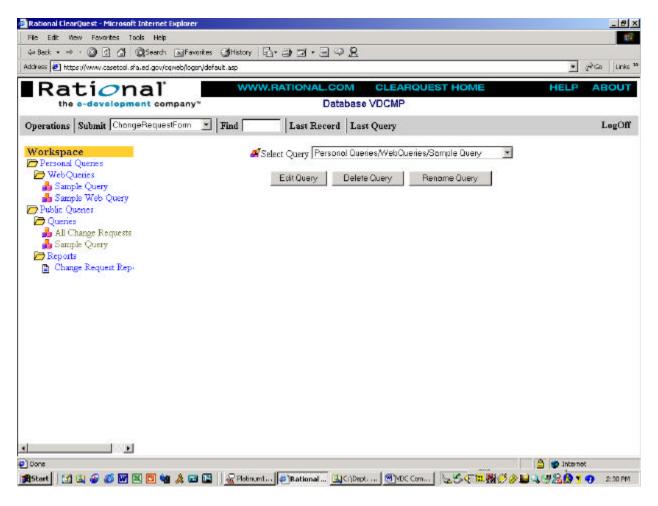


If no records can be found to match the specifics of the query, a page similar to the page above will be displayed.

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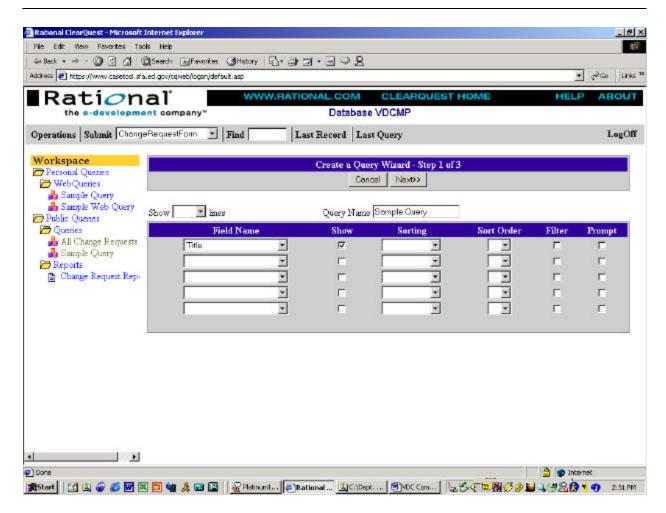
5.3 Modifying an Existing Query



To edit an existing query, the user must select 'Edit a Simple Query' in the 'Operations' menu. Once this is done, the page above will appear. The user is prompted to select a query in the 'Select Query' drop-down window. The user must then click the 'Edit Query' button

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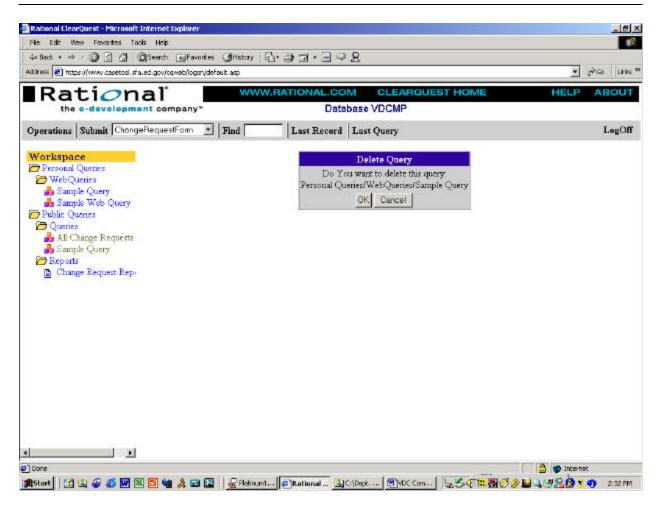




The page above will be displayed when the user clicks the 'Edit Query' button. The user will have the ability to request that certain fields be displayed, whether to sort data in ascending or descending order, filter information, etc.

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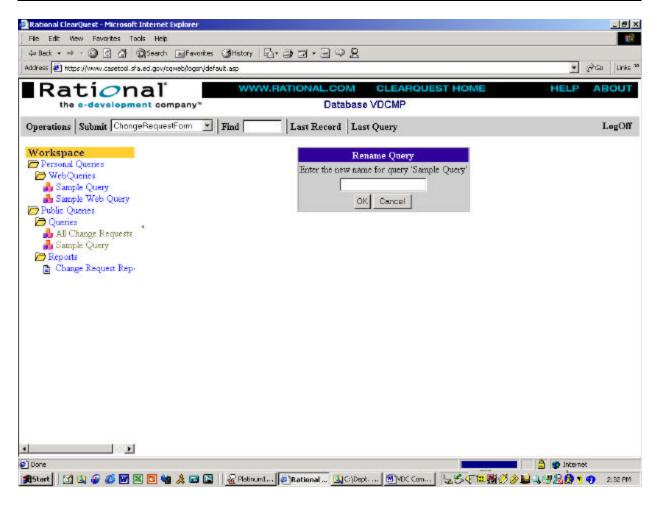




If the user decides to delete a change request, a prompt will appear to determine that the user really wants to delete the change request. The name of the change request will also appear in the 'Delete Query' prompt box.

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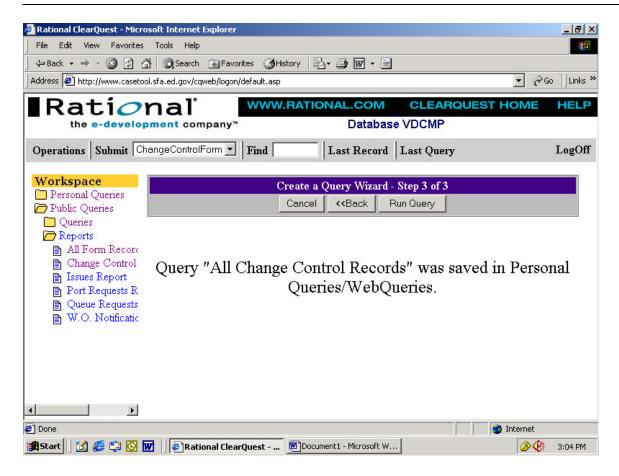




If the user clicks the 'Rename Query' button on the edit query page, a 'Rename Query' prompt box will appear. The user will have to enter the new name of the query and click 'OK' or the user can click 'Cancel' button to return to the 'Edit Query' page.

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Once the user has completed editing, deleting, or renaming the change request, a confirmation page will appear similar to the page above.

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6. Reports

Reports can be generated in order to view the status of a project at a glance. There are two main folders in the Workspace: 'Personal Queries' and 'Public Queries'. The reports generated by user are always stored in the 'Personal Queries' folder. Several predefined reports have been created during the development of the VDC Coordination tool and are located in the 'Public Queries' folder.

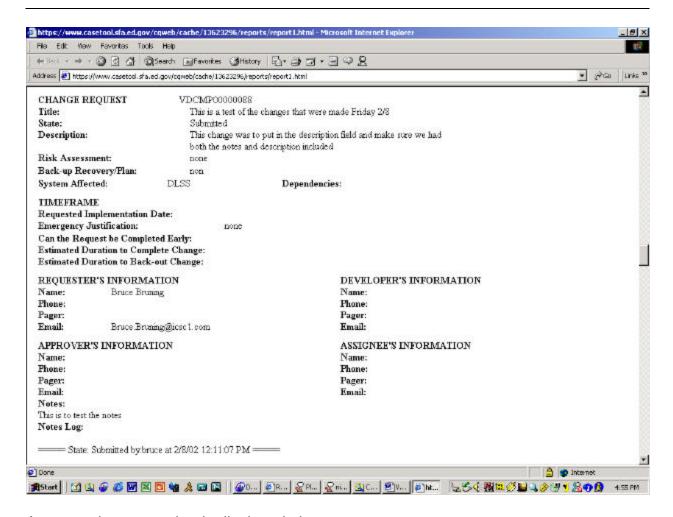
6.1 Predefined Reports

Listed below are the existing report formats available to users. To generate a report, select a predefined report in the 'Reports' folder within the 'Public Queries' folder.

- Change Request Displays the Title, State, Description, Systems Affected,
 Dependencies, Risk Assessment, Backup/Recovery Plan, Requested
 Implementation Date, Early Completion, Estimated Duration to Complete Change,
 Estimated Duration to Backout Change, Requester's Name, Requester's Phone,
 Requester's Pager, Requester's Email, Developer's Name, Developer's Phone,
 Developer's Pager, Developer's Email, Approver's Name, Approver's Phone,
 Approver's Pager, Approver's Email, Assignee's Name, Assignee's Phone,
 Assignee's Pager, Assignee's Email, Notes, and Notes Log fields.
- Individual Change Request Report Displays the Title, State, Description, Systems Affected, Dependencies, Risk Assessment, Backup/Recovery Plan, Requested Implementation Date, Early Completion, Estimated Duration to Complete Change, Estimated Duration to Backout Change, Requester's Name, Requester's Phone, Requester's Pager, Requester's Email, Developer's Name, Developer's Phone, Developer's Pager, Developer's Email, Approver's Name, Approver's Phone, Approver's Pager, Approver's Email, Assignee's Name, Assignee's Phone, Assignee's Pager, Assignee's Email, Notes, and Notes Log fields.

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An example screen shot is displayed above.

**Note: If an existing report format does not meet the need of a user, the user will need to contact the VDC Communications schema administrator to create a new report format.

6.2 Creating Reports

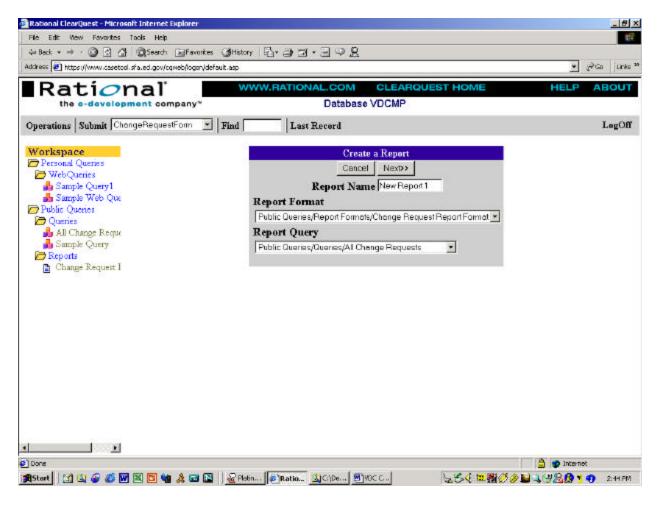
ClearQuest allows users to create new reports from the web client. A report is created by selecting an existing report format. The report format will have already been created using the thick client, Crystal Reports, and a query to populate the report. The report can be saved to the Personal Queries folder. When the report is run from that point on, it will pull the data accurate for that point in time. A report is not static and will update as the result set for a certain query changes.

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The following reports exist in the 'Public Queries' – 'Reports' folder on the web client:

- 'Change Request Report' Uses the 'All Change Request Form Records' query and the 'Change Request Report Format' report format to display all change requests.
- 'Individual Change Request Report' Uses the 'Select ID' query and the 'Change Request Report Format' report format to display an individual change requests.
 Before the change request is displayed, the user will be prompted to enter a change request ID.

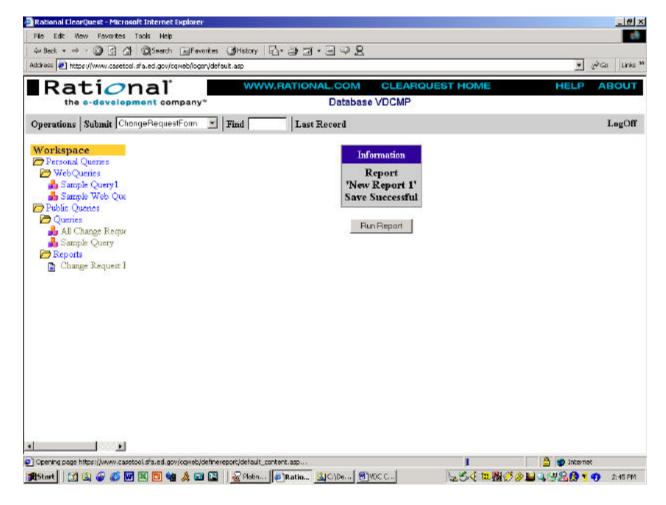


To create a report, the user must select 'Create a Report' in the 'Operations' menu. Once this is done, the page above is displayed. The user can cancel this action or enter a report name, select the report format, and select the report query. When the required information is selected, the user must click the 'Next' button.

** Note: Report formats can only be created from the thick client. Contact your schema administrator if you need a new report format.

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If the user clicks the Next button, the following page will display. The name of the report is displayed as well. The user now can click the 'Run Report' button. Once this is done, a report will be generated

** Note: The report is displayed based on your browser's settings. Alter the settings to change the font.

6.3 Modifying an Existing Report

Depending on how the user modifies an existing report, the process and screen shots will be very similar to section 5.3, "Modifying an Existing Query".

To edit an existing report, the user must select 'Edit a Report' in the 'Operations' menu. Once this is done, the next page displayed will allow the user to edit a report, delete a report, or rename a report. Please refer to section 5.3.

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7. Proxy Server Settings

This section discusses the required VDC proxy server settings in order to gain access to the ClearQuest web client. If you already are connected to the VDC, this is not necessary.

7.1 Internet Explorer

The following steps are required to set up the proxy server settings for Internet Explorer:

- 1. Open the Internet Explorer browser.
- 2. Select 'Internet Options' in the 'Tools' menu.
- 3. Click 'LAN Settings' on the 'Connections' tab.
- 4. In the 'Proxy Server' section, check the 'Use a Proxy Server' checkbox.
- 5. Enter nsmmfw02.cscoe.accenture.com in the 'Address' field.
- 6. Enter the proper port number in the 'Port' field. This may default to 80.
- 7. Check the 'Bypass proxy server for local addresses' checkbox.
- 8. Click 'OK' in the 'Connections' tab.
- 9. Click 'OK' in the 'Internet Options' tab.
- 10. Close the browser.

7.2 Netscape Navigator

The following steps are required to set up the proxy server settings for Netscape Navigator:

- 1. Open the Netscape Navigator browser.
- 2. Select 'Preferences' in the 'Edit' menu.
- 3. Under the 'Category' section, click the triangular symbol next to 'Advanced' to expand the selection.
- Select 'Proxies'.
- 5. In the 'Proxies' menu, click the 'Manual Proxy Configuration' radio button.
- 6. In the 'HTTP Proxy' field, enter nsmmfw02.cscoe.accenture.com and enter 80 as the value in the 'Port' field.
- 7. Click 'OK'.
- 8. Close the browser.

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8. Contact Us

If you have any questions or administrative needs, please contact:

Bruce Bruning (202) 962-0751 bruce.bruning@icsc1.com

For problems accessing the web client not related to your user account, such as the page does not load, contact the Rational Tool Implementation Support Team at (202) 962-0757.

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